Toolbar user guide

Assistant–Enterprise Toolbar

Log In and Log Out

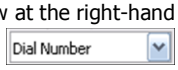
To log in, click **Login** . To log out, click **Login** again.

Dial Number

In the *Dial Number* box, type the number you want to call. Press ENTER.

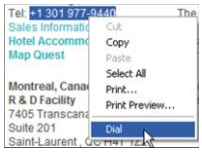
Redial Number

You can redial up to 10 previously dialed numbers.

- Click the arrow at the right-hand side of the *Dial Number* box. 
- On the *Dial Number* list, click the number you want to redial.
- Press ENTER.

Dial from Web Page (Internet Edition)

- On a web page, select a phone number.
- Highlight and right-click the number.
- On the shortcut menu, click *Dial*.



Dial from E-mail (Outlook Edition)

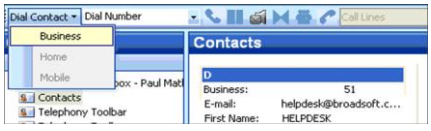
You can dial a contact directly from an Outlook e-mail message.

- Open an e-mail that contains the number you want to dial.
- Make sure the e-mail is either an open message or a preview in the HTML format.
- Highlight and right-click the number.
- On the shortcut menu, click *Dial*.

Dial from Contacts (Outlook Edition)

Assistant–Enterprise within Outlook, allows you to dial the *Business*, *Home*, or *Mobile* number of any Outlook contact.

- In the list of folders, click *Contacts*.
- From the *Contacts* list, select the contact you want to call.
- On the Assistant–Enterprise toolbar, click the arrow at the right-hand side of the *Dial Contact* list.
- Select the type of number to call (*Business*, *Home*, or *Mobile*).



Dial from Personal Directory

- On the Assistant–Enterprise toolbar, click *Personal Directory* .
- On the list that appears, click the desired phone number.

Dial from Group Directory

- On the Assistant–Enterprise toolbar, click *Group Directory* .
- On the list that appears, click the desired phone number.

Dial from Speed Dial Directory

- On the Assistant–Enterprise toolbar, click *Speed Dial* .
- On the list that appears, click the desired phone number.

Dial from Call History

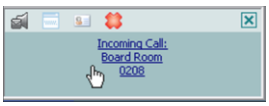
- On the Assistant–Enterprise toolbar, click *Call History* .
- On the list that appears, click the desired phone number.

Dial from Search

- In the *Search* box, type your search criteria or click the arrow at the right-hand side of the *Search* box and select a previous search from the list.
- Press ENTER. Assistant–Enterprise displays the results of your search.
- Click the phone number you want to dial.

Call Notification

When you initiate or receive a call, Assistant–Enterprise displays a notification window above the system tray, which includes the other party's identification from BroadWorks or Outlook directories.



Answer Call

In the toolbar, click **Answer** or click the *Call Notification* window.

Blind Transfer

Calls can be blind transferred while active, held, or ringing in.

- Call the destination number. This automatically puts the first party on hold if the first party is not already on hold.
- Click **Transfer** .

Consulted Transfer
Calls can be transferred with consultation while active, held, or ringing in on your phone.

- Call the destination number. This puts the first party on hold.
- Wait until the called party accepts your call, and then click **Transfer** to connect the parties.

End Call
You can end incoming and outgoing calls from the toolbar and from the *Call Notification* window.

Click **End** on the toolbar or click **End Call** in the *Call Notification* window.

Save vCard
To save the caller's phone number and personal information as a vCard in Outlook, in the Call Notification, click **Add vCard** .

Web Screen Pop
To open a URL in your browser for an incoming call, click **Web Pop URL** in the *Call Notification* window. This opens a page in your browser window that contains information about the calling party encoded in its URL.

Hold Call

- On the *Call Selector* list, select the call to hold.

Click **Hold** .

Un-hold Call

- On the *Call Selector* list, select the held call.
- Click **Answer** .

Initiate Conference
You can initiate a conference with a minimum of two and a maximum of 31 parties. All calls on the *Call Selector* list are added to the conference.

- Click **Conference** .
- To add incoming or outgoing calls to the conference, click **Conference**.
- To drop a conference participant, select the participant's number on the *Call Selector* list and click **End** .

Transfer Call to Voice Mail
You can transfer calls to your voice mail from the toolbar and from the *Call Notification* window.

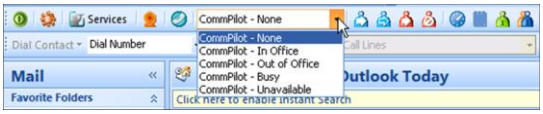
- To transfer to voice mail, click **Transfer to Voice Mail** either on the toolbar or in the *Call Notification* window.

Retrieve Voice Mail
To listen to your voice mail:

- Make sure that you are not currently engaged in a call. No entries must be present on the *Call Selector* list.
- Click **Transfer to Voice Mail** on the toolbar.

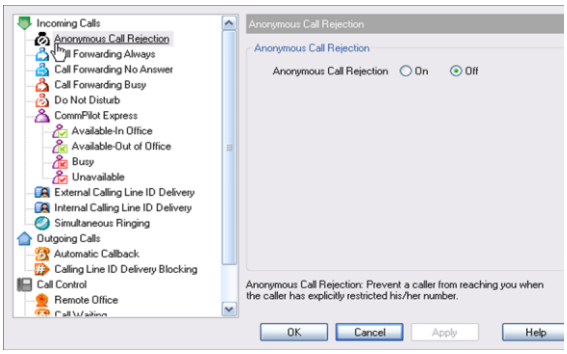
Set Your CommPilot Express Profile
CommPilot Express allows you to manage your calls based on your schedule using four configurable profiles: *In Office, Out of Office, Busy*, and *Unavailable*.

- Select a profile from the *CommPilot* drop-down list on the toolbar.
- To disable all profiles, select *CommPilot – None*.



Change Services Settings
The *Services* dialog allows you to easily change your service settings for telephony services, such as such as Voice Messaging, CommPilot Express profiles, Call Forwarding, and Call Waiting.
NOTE: You see only the services you have.

- On the toolbar, click **Services** .
- On the left-hand side of the *Services* window, select the tab of the service you want to configure.
- On the right-hand side, select or fill out required information.



Access Services Settings
Frequently-used services are represented on the toolbar by their own buttons for easy assess: Call Forwarding Always ,

Call Forwarding No Answer , Call Forwarding Busy , Do Not Disturb , Remote Office , and Simultaneous Ringing . By clicking a button, you can set the corresponding service on or off.

Links

The Assistant Enterprise links list contains URLs preconfigured by your service provider. Select an item from the list to navigate to that page.

Call Selector

The *Call Selector* is a drop-down list that shows current calls and lets you pick the call you want to perform the action on, but does not switch the call.

Login Button

The **Login** button , which allows you to log in and log out of Assistant–Enterprise displays the following states:

- A grey button indicates that you are not logged in.
- A green button shows that you are currently logged in.
- A disabled button shows that Assistant–Enterprise is attempting to log you in.
- A red button indicates that your last login attempt failed.

Portal Access (Internet Edition)

The **Portal** button allows you to access your web portal directly from Assistant–Enterprise.

Click **Portal** .

Options

You can configure your account, connection settings, and dialing rules through this dialog.

- On the toolbar, click **Options** .
- Select the option you want and provide the required information.

Directories

The following directories are available to you from the Assistant–Enterprise Toolbar:

- **Personal Directory** is your web portal personal directory integrated with Assistant–Enterprise.
- **Group Directory** integrates the group contacts, provided by your service provider.
- **Call History** allows you to view your missed calls, received calls, and dialed calls.
- **Speed Dial** contains your speed dial entries.